User Manual

Administrator Program

V1.2

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BIOADMIN: BIOTRACK'S ADMINISTRATOR PROGRAM

The administrator program allows for the communication among BioTrack devices in order to transfer data, generate reports, export data in other file formats, and change the devices' configuration.

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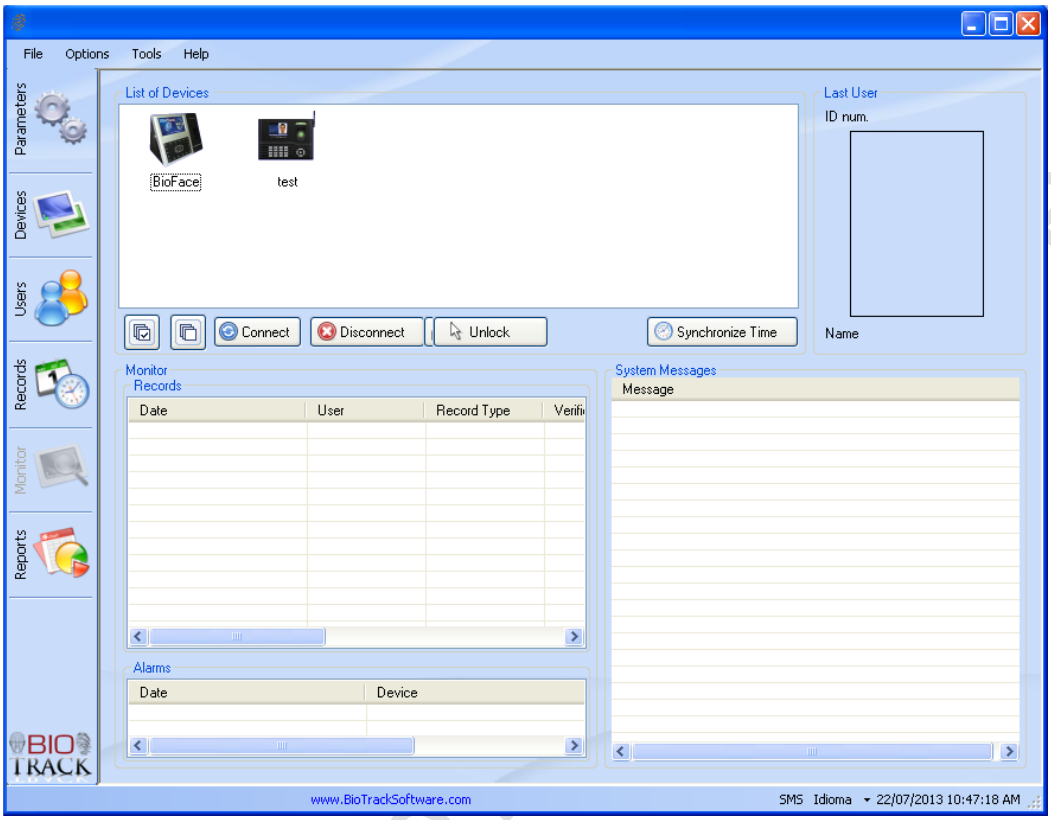
1 MONITOR

This window lets you see all attendance and access marks in real time and any other alerts, such as a device's an anti-dismantling alarm being triggered. You can find it by clicking **Monitor** button on the left panel or on **Options→Monitor** on the main menu.



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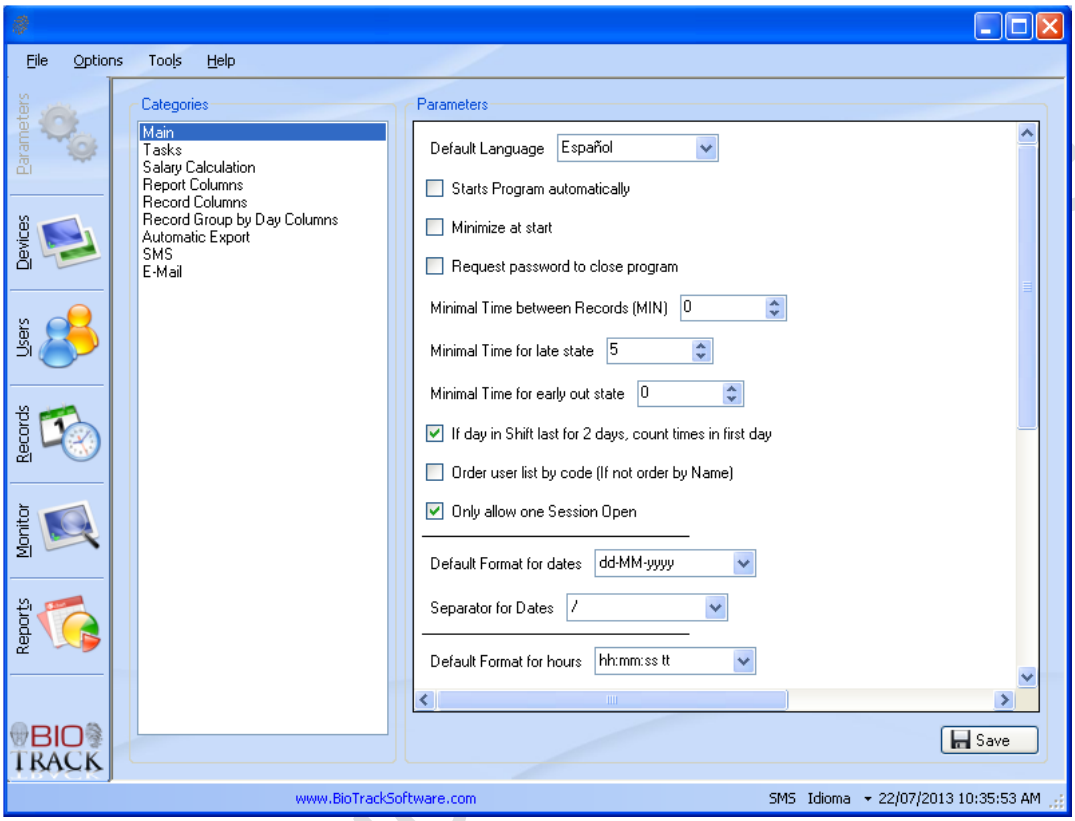
2 PARAMETERS

From this window you can change the different system parameters. You can find it by clicking on the **Parameters** button on the left panel or on **Option→Parameters** on the main menu.

2.1 GENERAL PARAMETERS



Request password to close program: By choosing this option, you have to type an administrator password in order to close down the program.

Minimum time in between records (MIN): Minimum time during which any additional records are ignored.

Minimum time to become late: Any marks recorded before these many minutes will not be counted as late.

Minimum time for early checkout: Any exits before these many minutes will not be counted as too early.

If a workday covers 2 days, record it on the first day: This is a measure to be applied the sake of organized record keeping.
Order user list by code (if not, sort by Name): This option lets you sort users, for bookkeeping purposes, either by their code or their name.

Only allow one session open: An error message will appear if you try to have more than one session open at once.

Default date format: Format followed by the dates displayed in the program. Only the dates that use individual configuration will be able to use a different format.

Date separator: Character used to separate the day, month, and year.

Default format for Hours: Format followed by times displayed in the program. It allows you to pick between common and military times and whether or not it should include seconds.

Hours separator: Character used to separate hours, minutes, and seconds.

Default cut-off time: Anything that happens after this time is counted as part of the following day.

Default decimal positions: Number of decimal places to be used when displaying numbers.

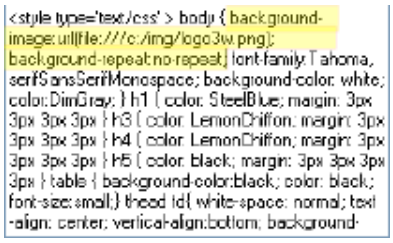
Decimal separator: Character used to separate decimals.

Style for html file: CSS style to be applied to any html file generated.

In order to add a logo to a report:

background-image:url(file:///c:/img/logo.jpg);
background-repeat:no-repeat;

Style for html file


<style type='text/css'> body { background-
image: url(file:///c:/img/logo3w.png);
background-repeat:no-repeat; font-family:Tahoma,
serif;SansSerif;Monospace; background-color: white;
color:DimGray; } h1 { color: SteelBlue; margin: 3px
3px 3px 3px } h3 { color: LemonChiffon; margin: 3px
3px 3px 3px } h4 { color: LemonChiffon; margin: 3px
3px 3px 3px } h5 { color: black; margin: 3px 3px 3px
3px } table { background-color:black; color: black;
font-size:small;} thead td{ white-space: normal; text
-align: center; vertical-align:bottom; background-

If you need to create some space for the logo, you can move the report's heading margin by changing by changing the command within the h1 (after the { and remember to end the command with ;):

margin: 3px 3px 3px 3px; (margin: up right down left;)

Show Access Control section: It shows the Access Control button on the left panel.

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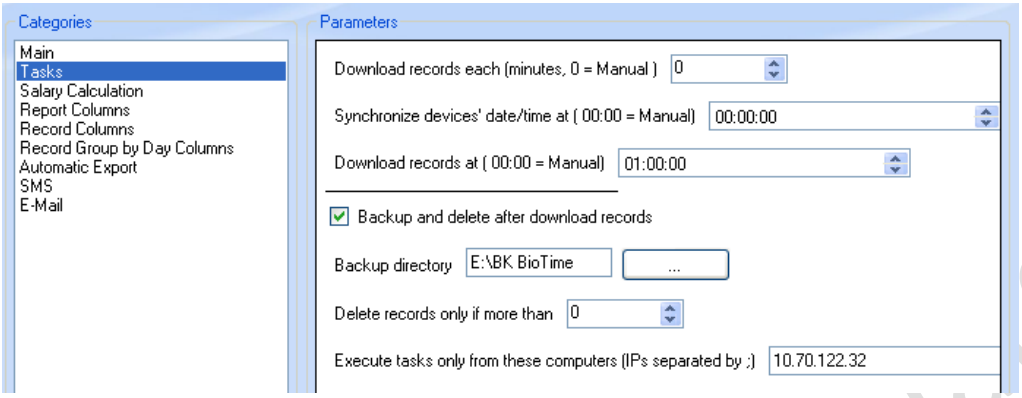
Date Format in Databases (Empty = use default; Separate Date with - ; Separate Times with :): Format followed by dates on databases.

2.2 TASKS



Automatically download records every (minutes, 0 = Manually): If you write any number greater than 0, all records will be downloaded from the devices when that number of minutes goes by.

Synchronize devices' date/time at (00:00:00 = Manually): Time at which the computer will send an official time to all devices. If you write 00:00:00, the synchronization will not happen.

Download records at (00:00:00 = Manually): Specific time at which all records will be downloaded. If you write 00:00:00, the download will not occur.

Back-up and Delete after downloading records: It creates a back-up of all downloaded records before deleting them.

Back-up directory: It lets you pick the folder in your computer where records downloaded from a device will be saved.

Delete records only if there are over (0=always erase): If you establish a limit, the records will be erased if they go over that limit.

Execute tasks from these computers only (IPs separated by ;): Only these computers can be used to run the program and make any changes.

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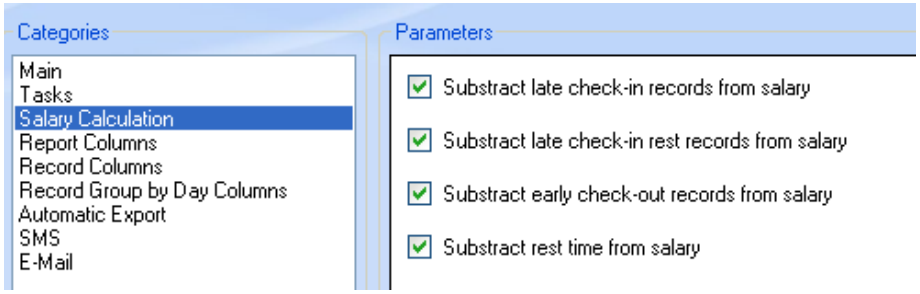
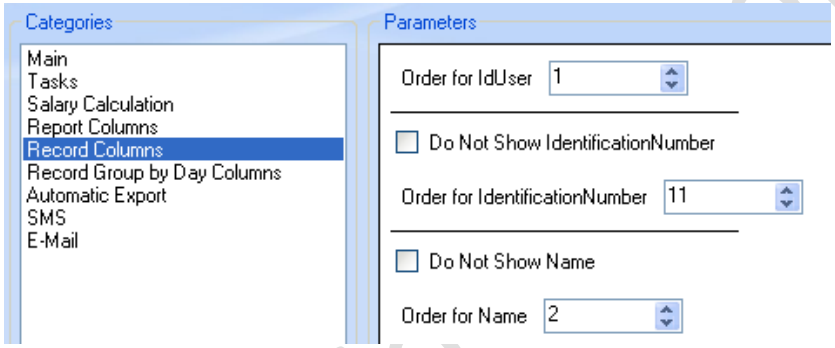
2.3 SALARY CALCULATION



You can specify any deductions to salaries.

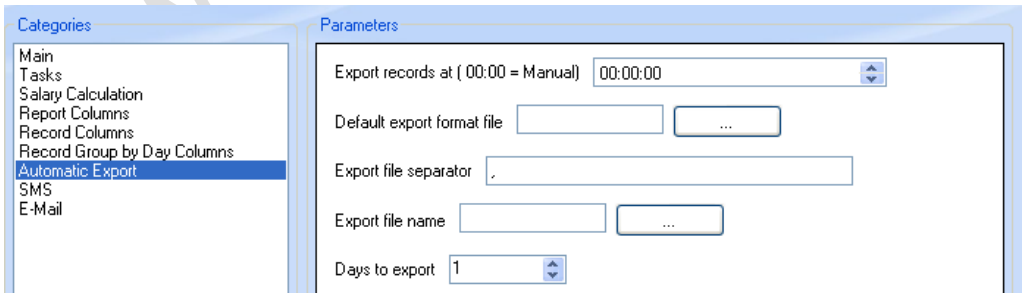
2.4 REPORT, RECORDS, AND RECORDS-BY-DAY COLUMNS

In these three sections you will be able to choose the columns to include in any tables generated by the program.



2.5 AUTOMATIC EXPORT

This function applies only to records reports.



Export records at (00:00:00 = Manual): Time at which all records will be exported. If you write 00:00:00, the export will not occur.

Default export format file: Location of the export template file. This must be a record export template.

Export file separator: Character used to separate each field in the resulting file.

Export file name: Name and location of the file to generate.

Days to export: Number of days to export. E.g.: if you define the export time to be 7:00pm and write 1 in 'Days to export', the program will export the records made between 7:00pm yesterday and 7:00pm today.

Export report at (00:00:00 = Manual): Time at which the report will be exported. If you write 00:00:00, the export will not occur.

Export days (Day number separator is a comma; empty = everyday): Indicates the number of the days to export. E.g.: if you write 15,28, reports will be exported on the 15th and the 28th of every month. If you leave it blank, the export will be daily.

Default export format file: Location of the export template file.

Export file separator: Character used to separate each field in the resulting file.

Export file name: Name and location of the file to generate.

Days to export: Number of days to export.

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2.6 SMS

Send SMS messages to cellphones: It determines whether or not you want to send text message confirmations for any marks made.

Port: Connection port for the given phone number.

Baud Rate: Speed at which the message will be sent.

Data, Stop, and Parity Bits: Extra information needed to complete the service configuration.

SMS message: With the given format, it indicates the content of the message. Use the {0} space for the date and {1} for the name, in that order.

2.7 E-MAIL

Send e-mails: It determines whether or not you want to send e-mail confirmations for any marks made.

SMTP Server: Name of the SMTP server used.

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Port: Number of the port used for this service.

User: For configuration purposes, the name of the user who will send the emails.

Password: User-defined password.

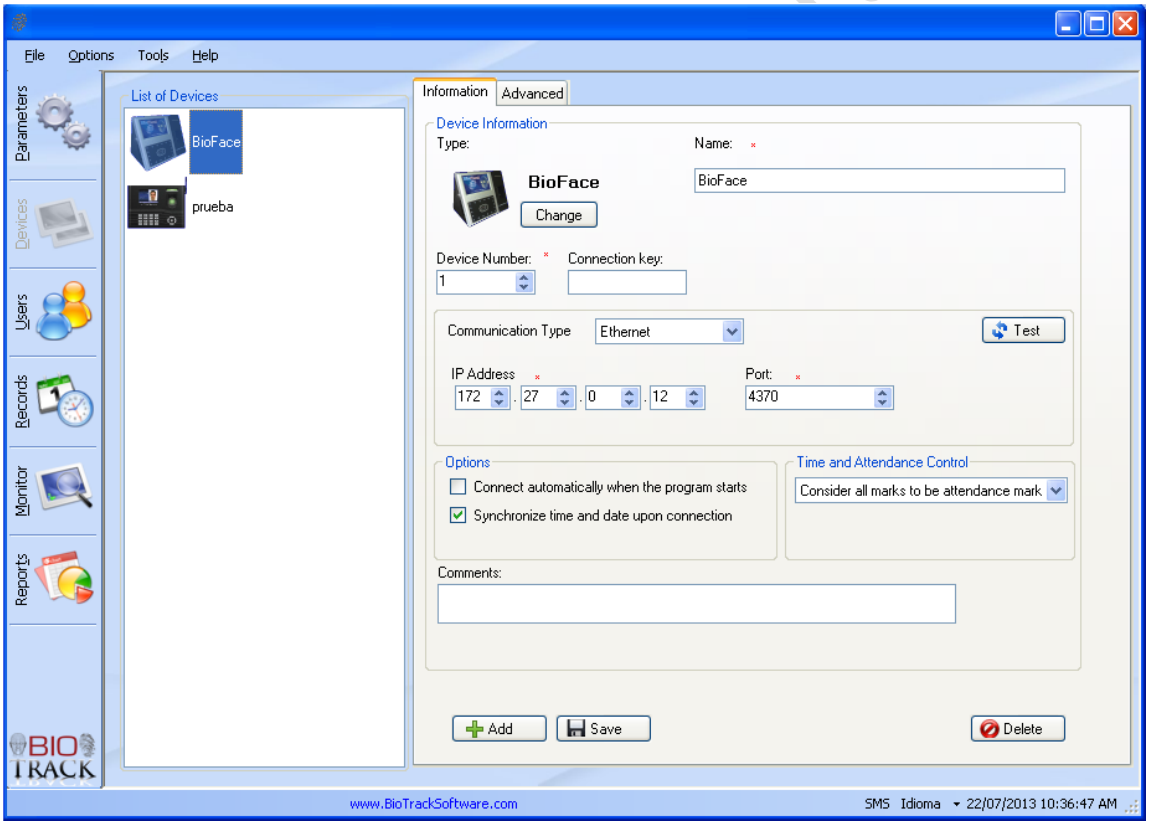
Use SSL: It defines whether or not SSL is used.

E-mail title: Content of the message's 'Subject' line.

E-mail message: With the given format, it indicates the content of the message to send. Use the {0} space for the date, {1} for the name, and {2} for the name of the device, in that order.

From e-mail address: The same as the user, but this is the one shown in the heading of the message.

3 DEVICES



This option allows you add devices to the system.

Type: Type of device that you want to add. You can change it by clicking on **Change**.

Name: Name of the device, in order to differentiate it from others.

Device Number: Number used to identify the device.

Connection key: Passkey needed to connect to the device, in case you set one up in the device.

Communication Type: Type of communication used to connect to the device: Ethernet, serial or USB.

IP Address: Device's IP address.

Port: Port used to communicate with the device.

Test: It performs a communications test.

3.1 OPTIONS

Connect automatically when the program starts: The program connects to the device as soon as it starts.

Synchronize time and date upon connection: The program synchronizes the device's time and date with its own as soon as the program starts.

3.2 ATTENDANCE CONTROL

This option allows you to choose whether the records made on the device are to be counted as attendance marks or not.

3.3 ADVANCED

Options to change the version used to save fingerprints (v9 or v10) and the device's IP address. You can also erase information, load user images, background pictures, and clear Administrator privileges.

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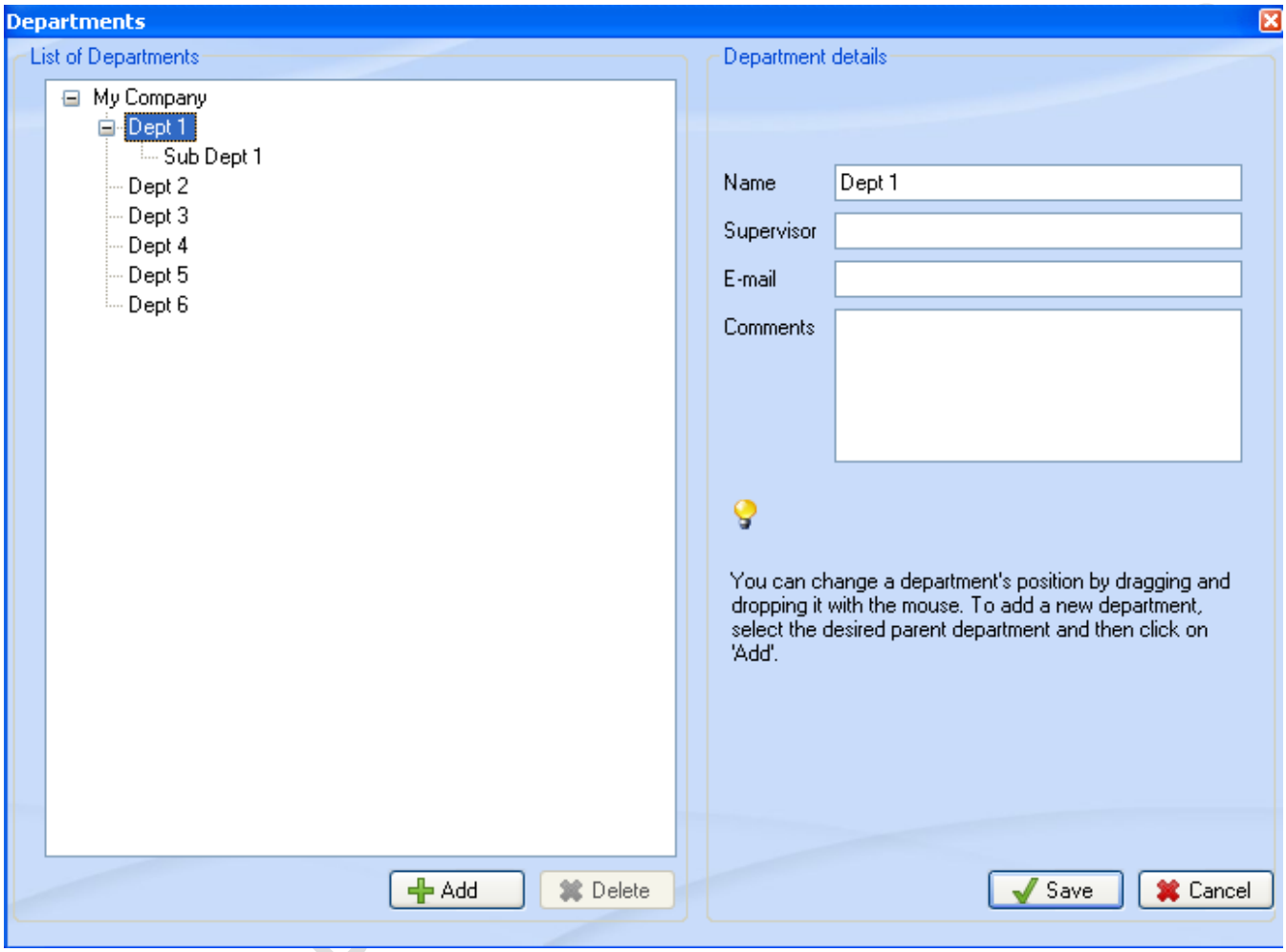
4 DEPARTMENTS

You can make changes to the different departments into which you can divide your company so as to assign users to those departments and generate reports about them.



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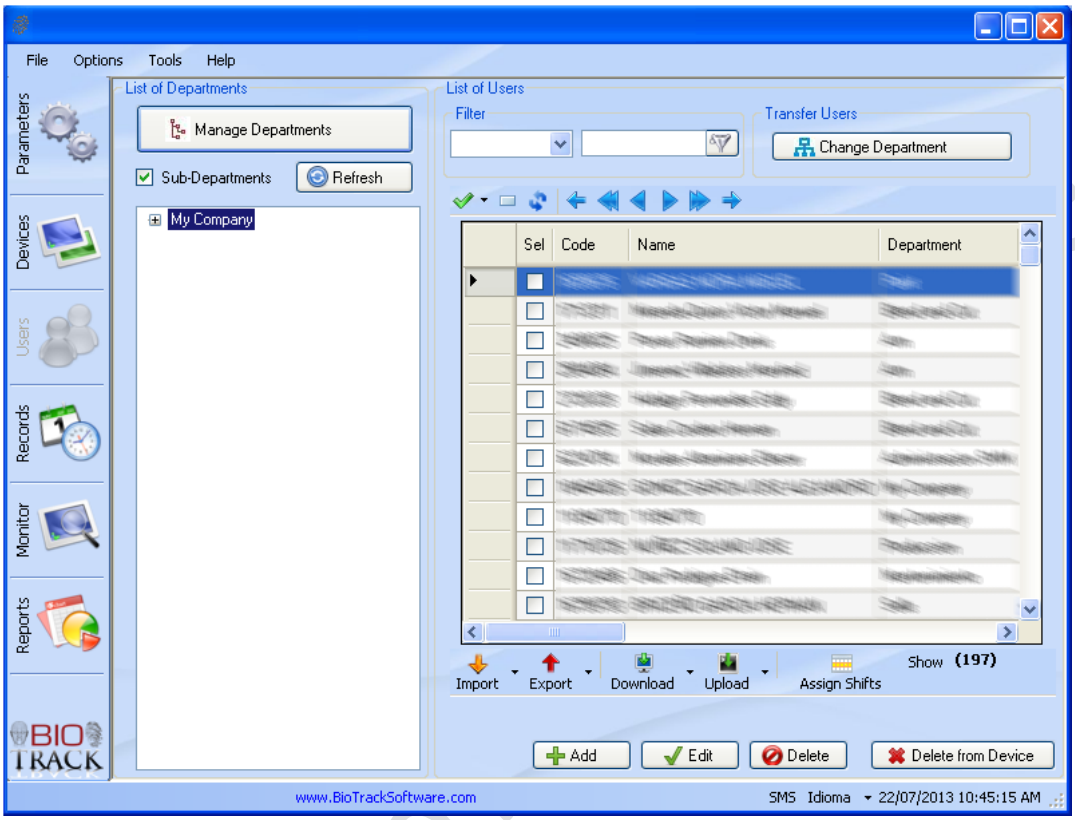
5 USERS

From this window you can access and change the personal and company-related information of any employee registered in the system. You can access it by clicking on the **Users** button on the left panel or on **Options→Users** on the main menu.



Manage Departments: Direct access to department management.

Sub-departments: If you pick this option, you will see all users in the department you are inspecting and in all its sub-departments. Otherwise, you will only see the users in the current department.

Filter: Categories used to filter users.

Change Department: In order to change a user's department assignment in the system, select the user, click on **Change Department**, and choose the desired new department.

Refresh: It refreshes the table with all user data.
Import: Use it to import user data from a file or a USB drive.

Export: Use it to export user data to a file or USB drive.

Download: Use it to download user data from the devices to the local database.

Upload: Use it to upload user data from the local database to the devices.

Assign Shifts: Select users and assign them a shift.

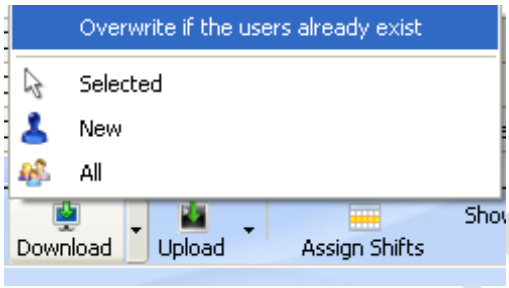
Add: Here you can create new users. This button will direct you to a window where you can add and save any personal and company-related information about each user.

Edit: You can modify the information of existing users, including their employee and proximity card numbers, and personal information such as date of birth, e-mail address, physical address, etc.

Delete: It eliminates any users you select from the system.

Delete from Device: A tool to remotely erase users from a device.

5.1 DOWNLOAD USERS (FINGERPRINTS/FACES) FROM A DEVICE



In the **Users** window you will find the **Download** button. You will have the choice to download every user in the device, the new ones, or whichever ones you select from the user list.

After this step, a window will prompt you to choose the device from which you want to download the users.

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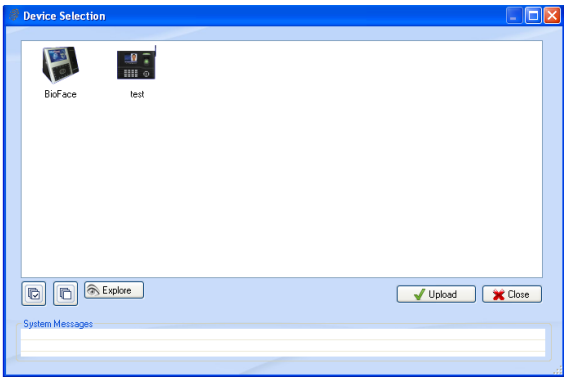
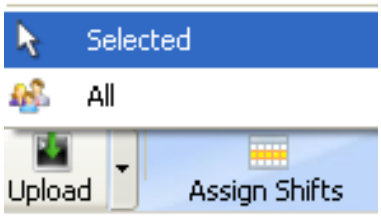


5.2 UPLOAD USERS (FINGERPRINT/FACES) TO A DEVICES



In the **Users** window you will find the **Upload** button. You will have the choice to upload onto the device either every user in the local database or the ones you select from the user list.

If you pick **Erase users from device before uploading**, all users will be erased from the chosen device before uploading the new ones.

In **Assign Shifts**, you will be able to assign one of different shifts to the users of your choice (as explained later) and set up an initial and final date for the shift.

Make sure that the initial date corresponds to the starting date of the shift. For instance, if you define a seven-day week and wish for the first day to be Monday, when you assign that shift, select the initial date to be a Monday. Every day after that will follow the usual order automatically. If you choose the initial date to be a Thursday, then Thursday will be considered the first day of the week, Friday the second, and so on.

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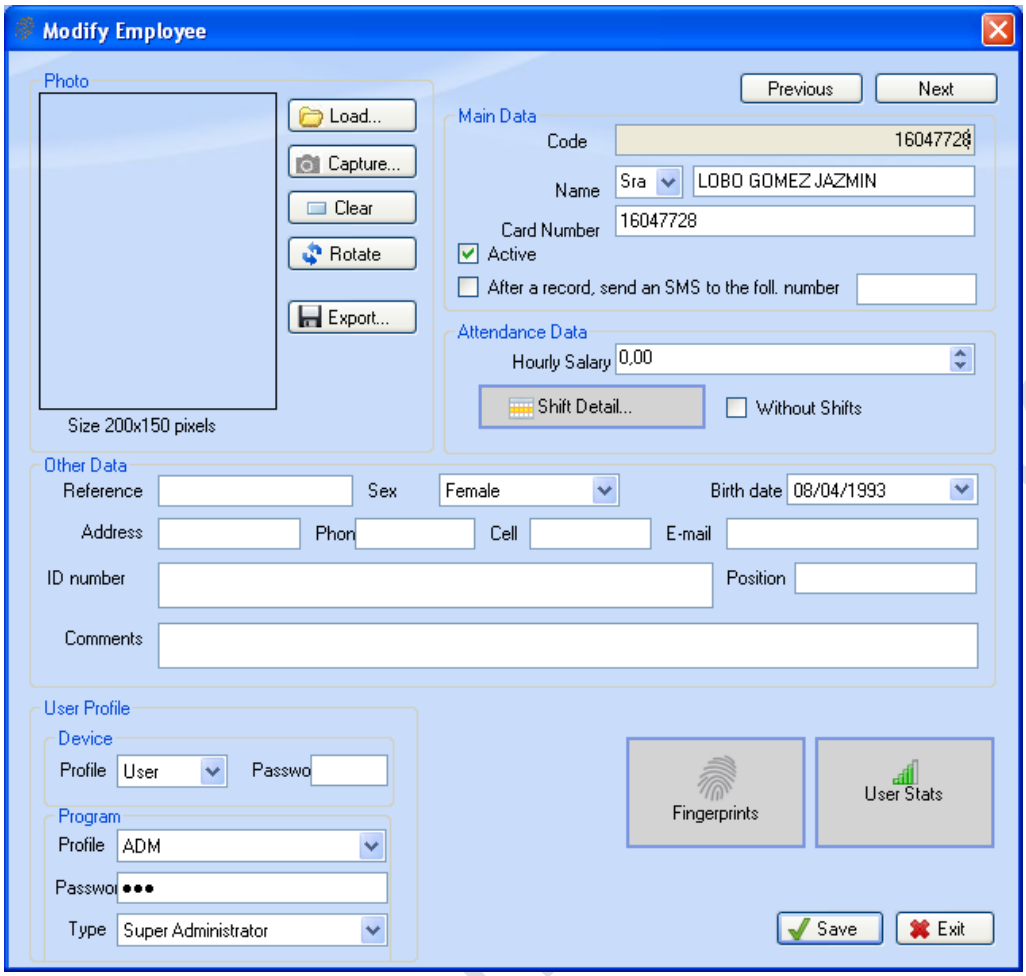
5.3 USER DETAIL



From this window you can modify existing users and add new ones. You can also see details on their assigned shifts.

The **Fingerprints** button will direct you to a window where you can register and modify users' fingerprint information.

User Stats will show you other user information, such as the number of registered fingerprints, who created the user, and when it has been modified.

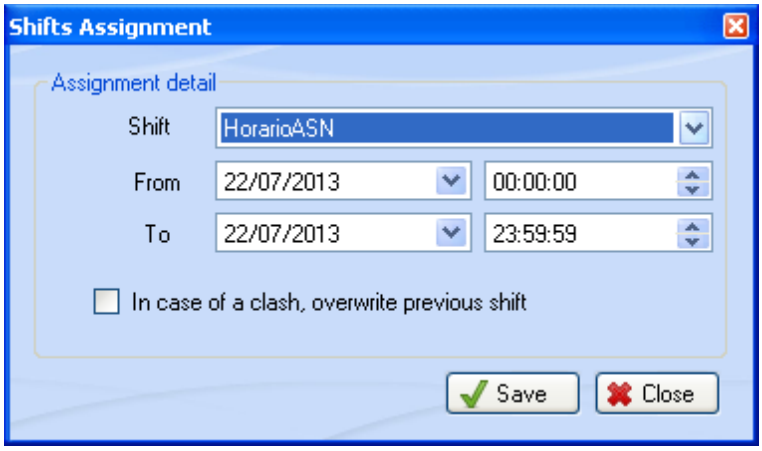
5.3.1 USER PROFILE

Device: User's profile type and password in the device.

Program: User's profile type and password in the program. If you want to grant a user administrator privileges, set the **Type** to Administrator.

5.4 SHIFT DETAIL

This window will show you details of the shift assigned to a user.



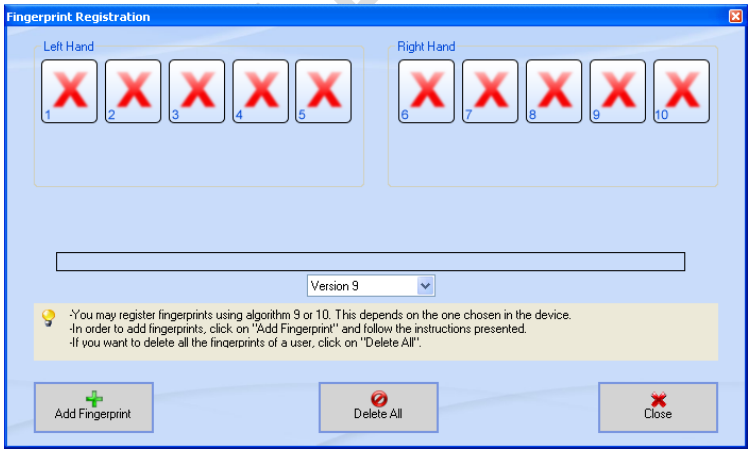
From this window you can add, modify, or erase users.

When you add/modify a user's shift, you need to pick the desired shift and the period of time during which it will be assigned to that user.

The starting date of the shift assignment will match the first day of the shift so that, if you defined a seven-day week and assign it starting May 5th, then that will be the first day of the shift, May 6th the second, and so on. After seven days, a new cycle begins.

5.5 FINGERPRINTS

In this window you can add, modify, or erase a user's fingerprints on record. You can also change the version in which it is to be saved, if the device allows it (since some devices only work with a specific fingerprint version).



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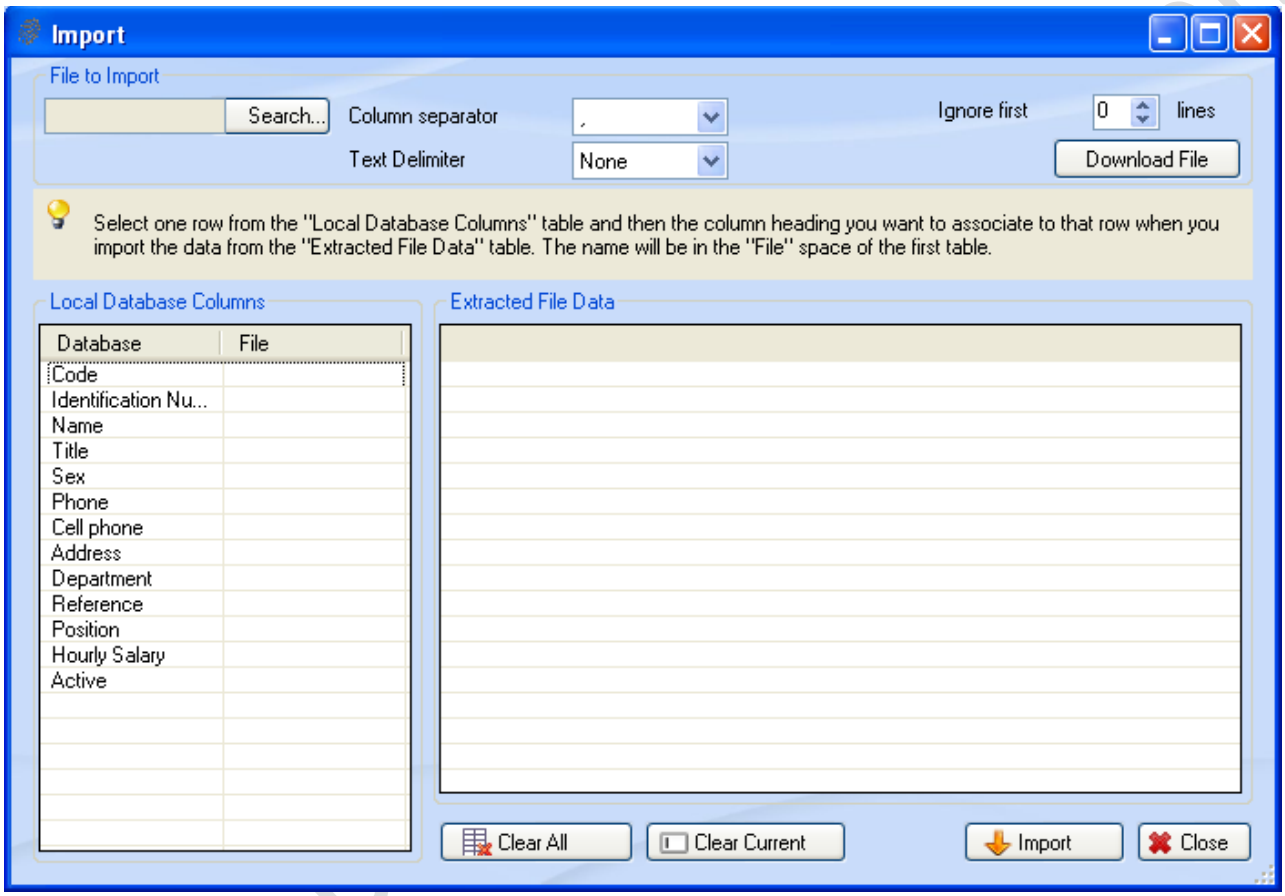
5.6 IMPORTING USERS

You can import users from a CSV or TXT file. First, choose the file to import (**Search**) and then define each of the parameters with the corresponding value according to the file.

When the file parameters have been defined, click on **Download File**. The file values will be loaded to the table on the right. If the process fails, you can correct the parameters and load them again to update the table.



Once you load the file, you can choose what field in the program's database corresponds to each column in the file. Database fields will be on the left-hand table. If you want to select their respective column in the file, choose the field on the left-hand table and then the heading of the column on the right-hand table. The number corresponding to the column will be displayed on the **File** column of the left-hand table.

If you want to clear any of the chosen fields, select it from the left-hand table and click on **Clear Current**.

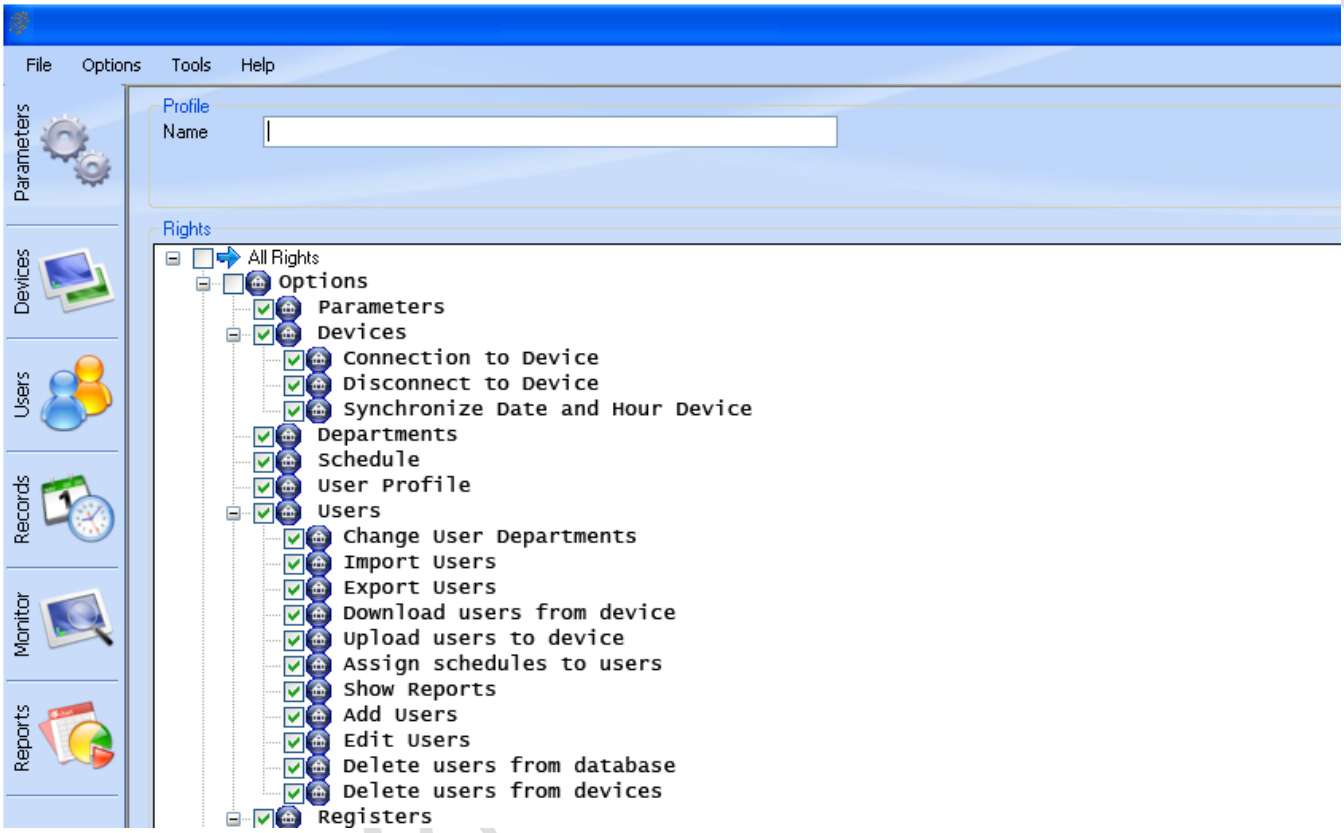
If you want to clear all assigned fields, click on **Clear All**.

The **Import** button will save the information onto the database.

Close will cancel the any action and close the window.

6 USER PROFILES

From this window you can create, modify, or erase user profiles. You can access it by clicking on **Options→User Profiles** on the main menu**.**



If you want to modify a profile, choose it from the list (under **Name**) and click on **edit**. Pick which areas of the program to grant access to each employee under that profile and finish by clicking on **Save**.

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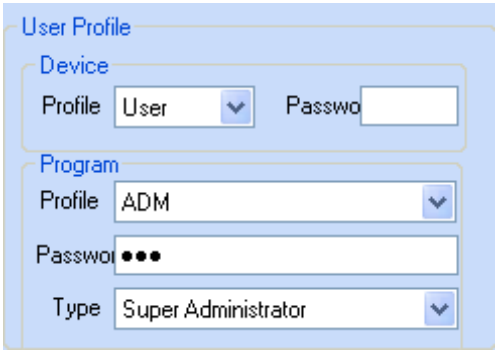
7 SYSTEM ADMINISTRATORS



Any profile created can be assigned to an administrator user from the **Users** page by choosing the desired user and clicking on **Edit**.

In the **User Profile** section, pick the desired profile and simply change the **Type** to Administrator.

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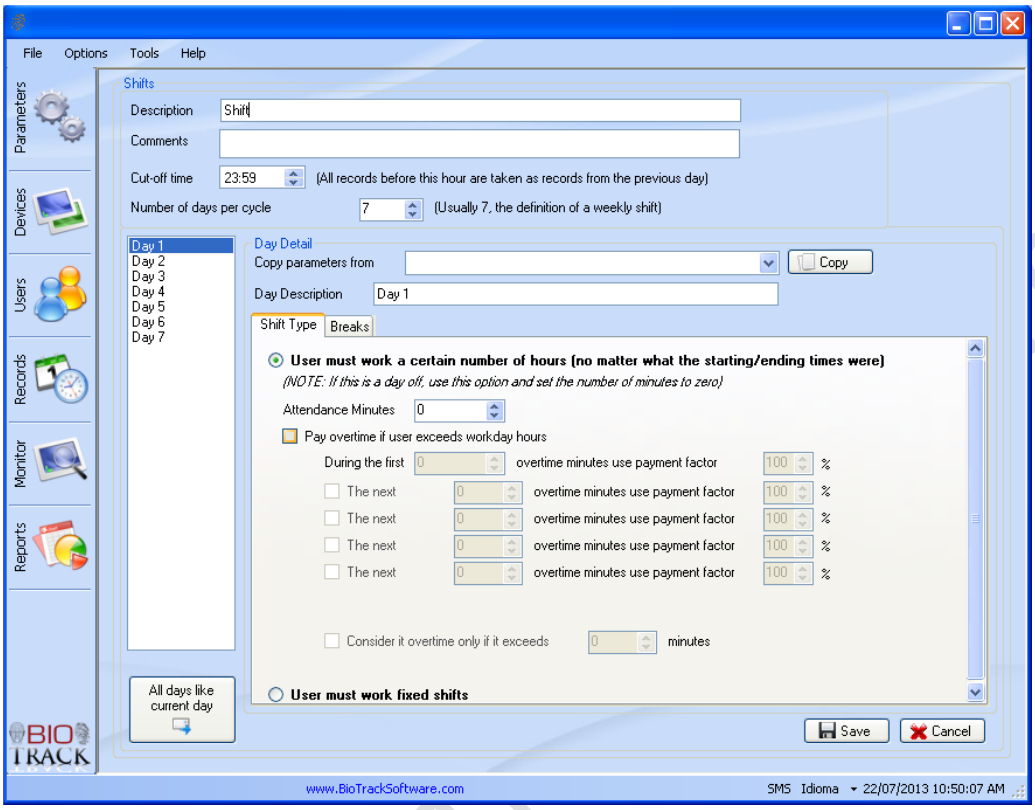
8 SHIFTS

This window lets you create different shifts for employees. You can access it by clicking on **Options→Shifts** on the main menu.



You can define two types of shifts: by number of hours worked or with fixed entry and exit times. Breaks can be defined analogously.

The **Cut-off time** is the time, for system purposes, at which the next day begins. Any record after this time is counted as happening on the following day. Every shift has its own cut-off time.

The **Number of days** indicates the days included in every cycle. We usually define seven-day weeks.

Add allows you define a new shift. You must include a **Description** (a distinguishable name), the **Cut-off time**, and the **Number of days per cycle**.

Each day can have different work hours.

You should know that every time you switch days on the list, any changes on the most recent day are saved.

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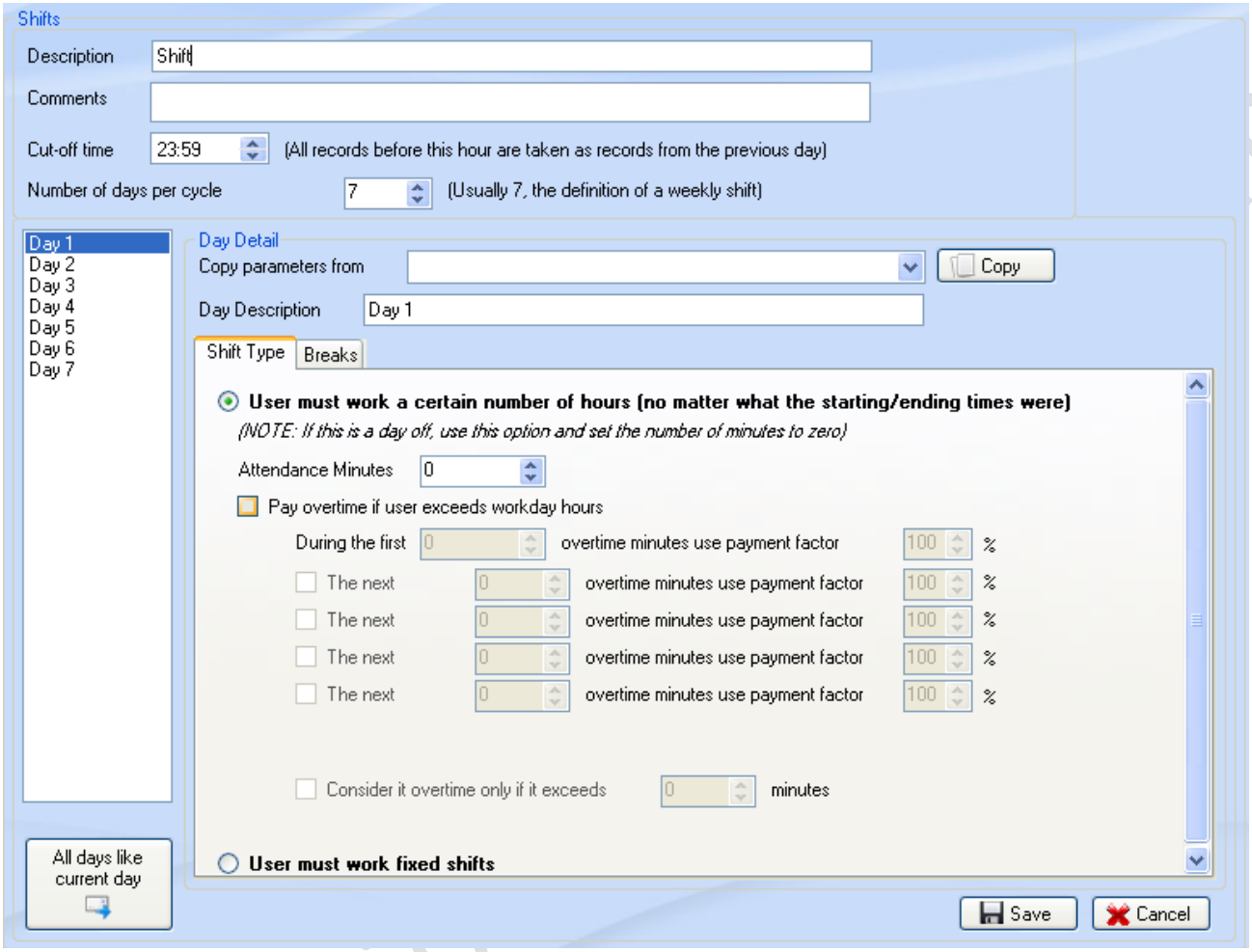
8.1 SHIFTS BY NUMBER OF HOURS WORKED



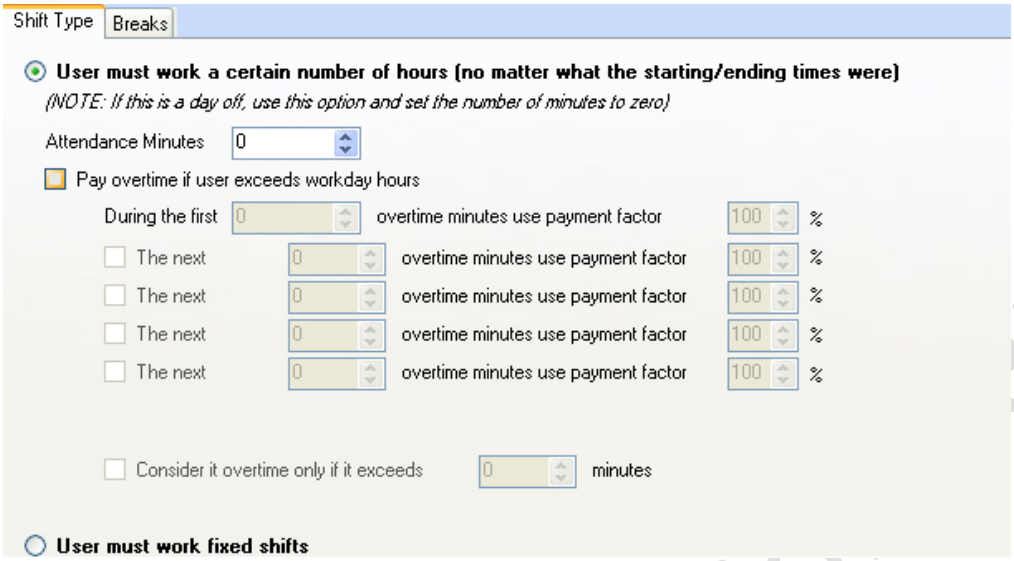
User must work a certain number of hours (no matter what the starting/ending times were) means the employee does not have fixed entry and exit times but rather, a fixed number of hours to work each day. The **Attendance minutes** are the time in minutes to work that day.

If you wish to pay any overtime, make sure to check the **Pay overtime if user exceeds workday hours** box and define the payment factor for each time range worked after hours.

If you do not check the box, any overtime will be counted as **unpaid overtime**.

8.2 SHIFTS WITH FIXED AND EXIT TIMES

If the user must have fixed entry and exit times, select the box called **User must work fixed shifts**.



In this type of shift you must establish entry and exit times. Consequently, this type of shift lets you keep track of tardiness, early departures, and any overtime by ranges of your choice.

If you want to pay for overtime, you have two boxes you can check: **Pay overtime if user shows up earlier**, for any hours worked before the usual workday, or else **Pay overtime if user works past exit time**, for hours after it.

If you do not check either box, any overtime will be counted as **Unpaid overtime**.

Consider it overtime only if it exceeds will tell the program when to start counting the overtime.

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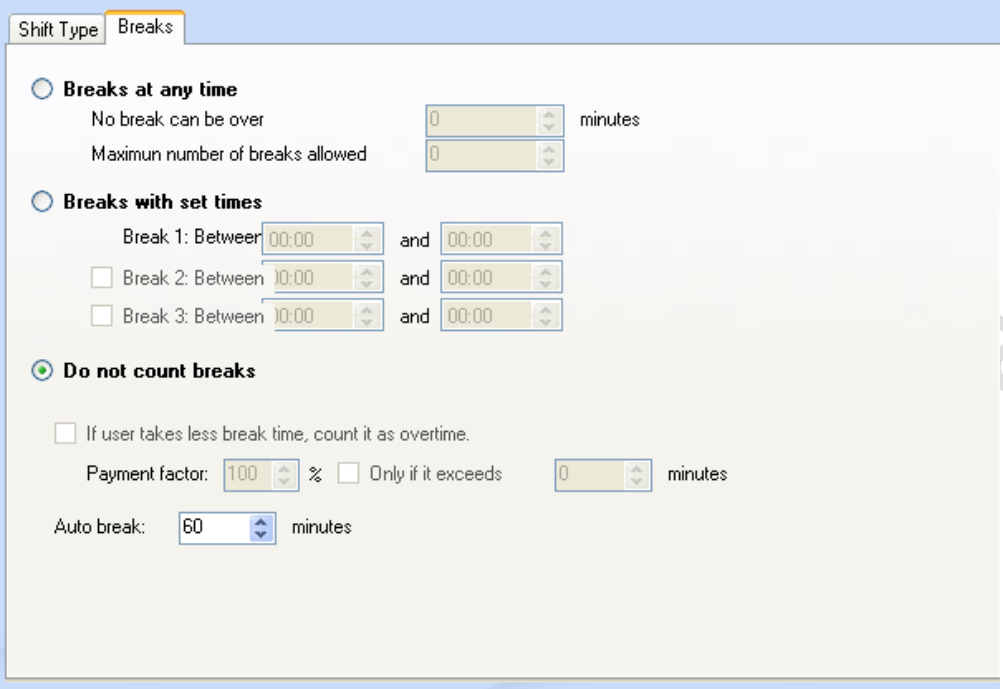
8.3 BREAKS

Breaks are determined by the marks received between the entry and exit marks.



As mentioned before, you can define breaks by total time (no matter when it starts and ends), or by fixed hours, where you can keep track of early check-outs and late check-ins. You can also indicate whether you want to count any overtime from breaks (for coming back to work before they are over).

Auto break automatically creates a break at the set time without there being any exit marks. If the user takes the break, it is counted as usual; if not, the system creates a mark to show on the records that the user took a break.

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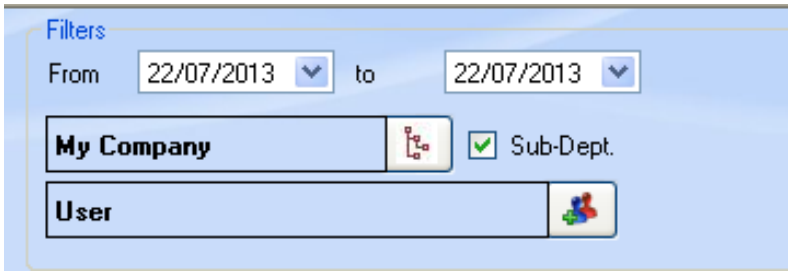
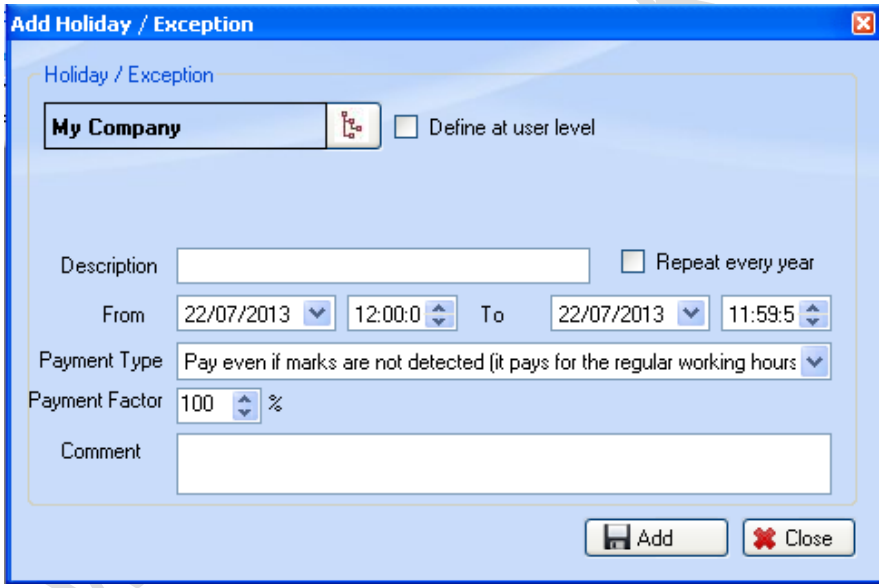
9 HOLYDAYS

From this window you will be able to manage the payment of holidays such as Christmas or Independence Day, as well as exceptions such as sick days.

You can access it by clicking on **Options→Holidays/Exceptions** on the main menu.



If you want to set up a holiday or exception, click on **Add**. You can define whether it will apply to every user, a department, or a specific user or group of users. Moreover, you can choose if the holiday or exception should be repeated every year, if it will be paid (whether the system detects attendance marks or not), what the payment factor should be, and any comment you want to add.



Once you establish all holidays and exceptions, you will see them listed on the main page of this section and be able to edit, delete, or simply organize them by date or department through filters.

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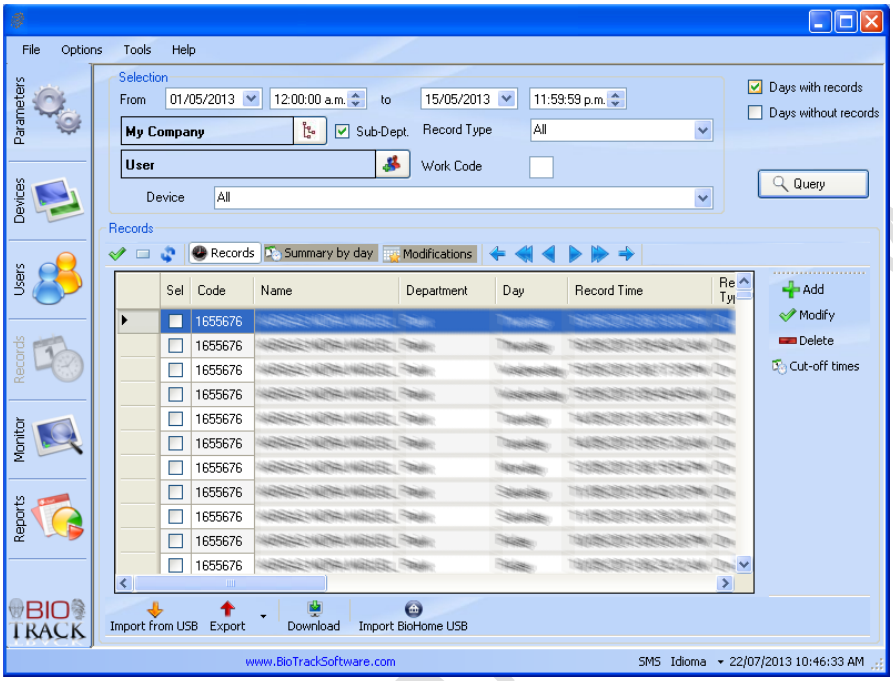
10 ATTENDANCE RECORDS

This section offers you a list of the attendance marks made by employees, which you can filter by date, department, user, or other parameters.

You can access this window by clicking on the **Records** button on the left panel or on **Options→Records** on the main menu.



From this window you can generate reports about total attendance times, **Add**, **Edit**, or **Erase** attendance marks, and assign a user or group of users a cut-off time different from the system default.

The report will show a separate list of the attendance marks made by employees that fulfill the desired filter.

Summary by Day groups the attendance marks by the cut-off time assigned to the user and it calculates the total work and break times during that day.

Import from USB lets you access and save records from devices that cannot be accessed through the network.

Export to file lets you export your report in different formats (CSV, LOG, TXT, DAT).

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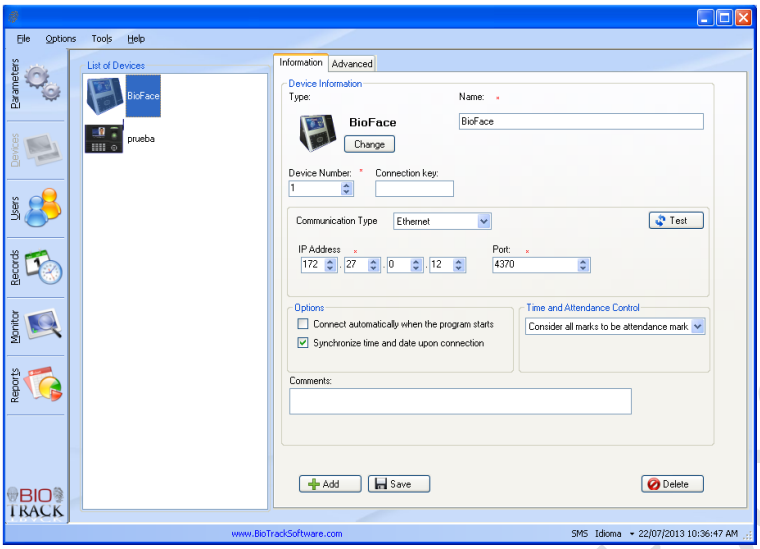
Download lets you save the records directly from the devices selected from the list.

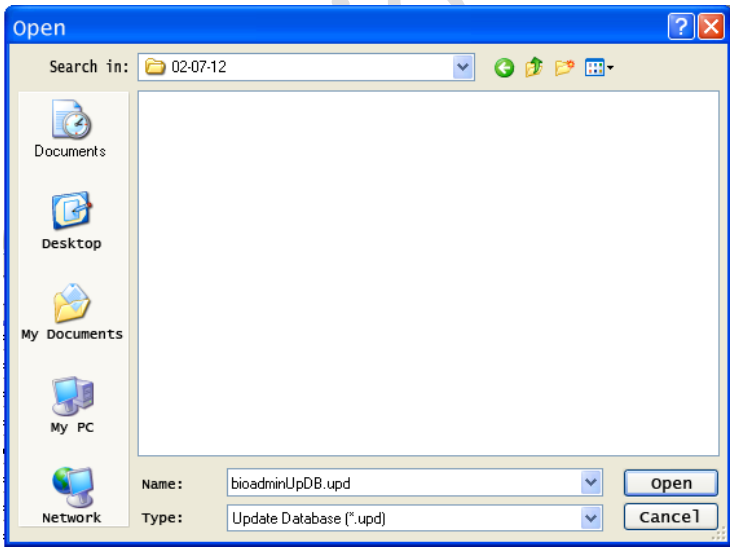
10.1 IMPORT ATTENDANCE RECORDS FROM DEVICES

This can be done directly if you have access to the device through the network simply by clicking on **Download** on the **Records** window.



You need to select the devices from which you want to import the records.

There is also the choice of importing the records through a file generated on the device if you do not have access to the network. In order to do this, click on **Import from USB**, and search for the file generated by the device.



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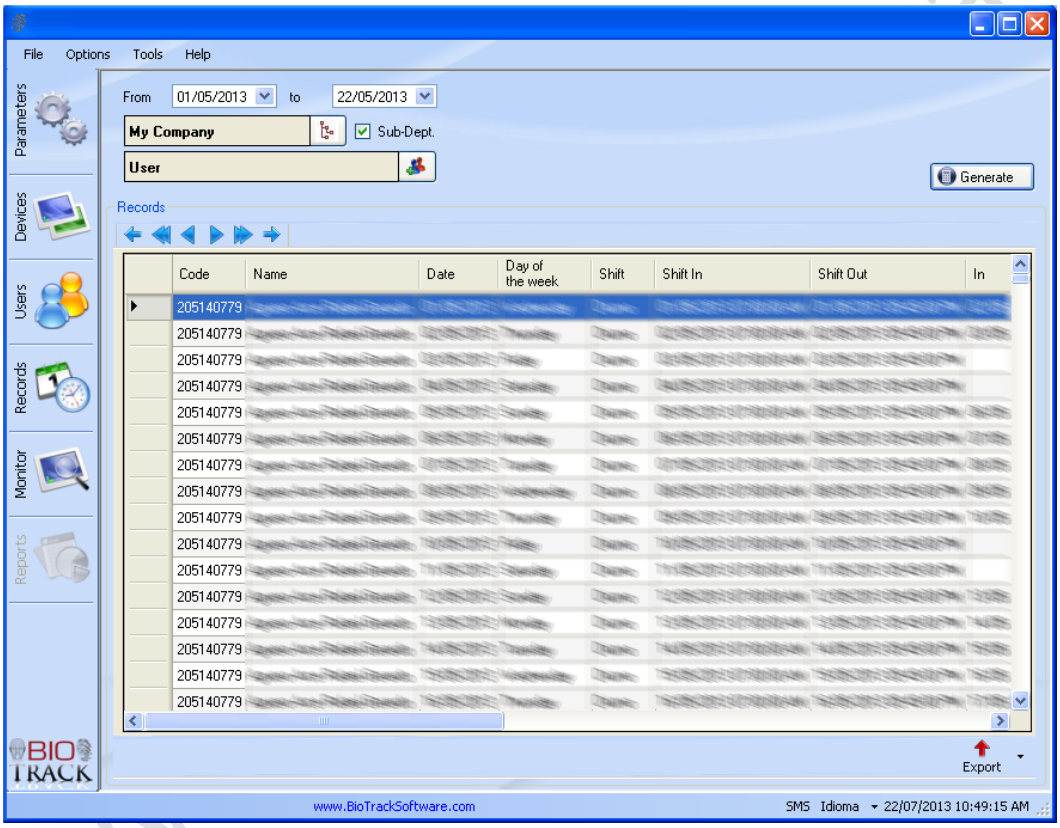
10.2 REPORTS

The reports are the result of a detailed analysis of the attendance records based on the shifts assigned to users. You can calculate salaries, overtime, early check-outs, late check-ins, etc.

First, you need to select the filtering parameters, such as a date range, department, and users to be included in the report, and then click on **Generate**.

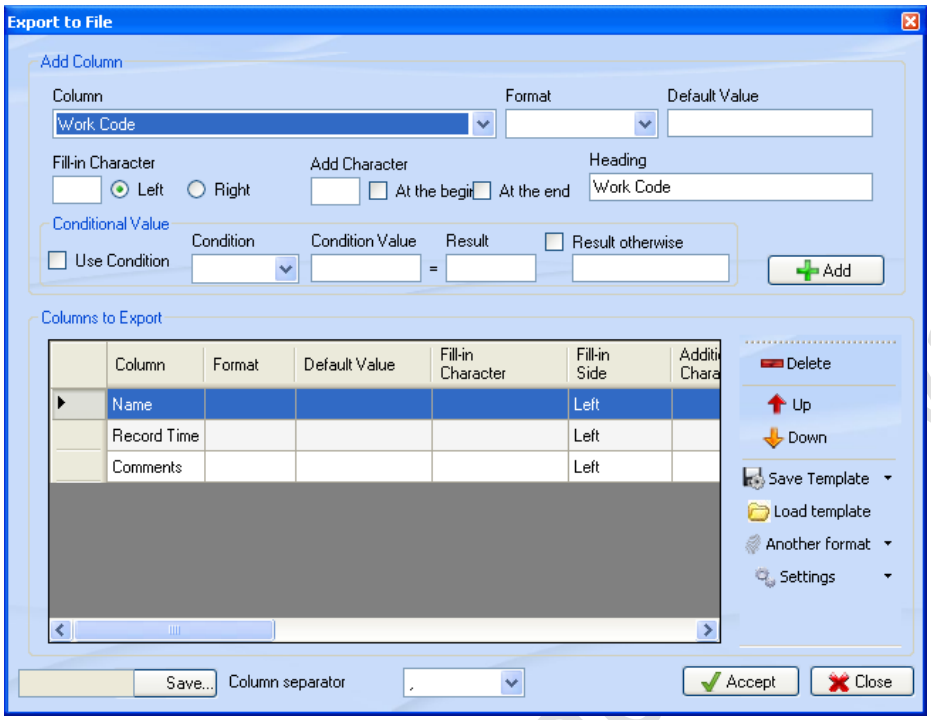
You can access this window by clicking on **Reports** on the left panel or on **Options→Reports** on the main menu.



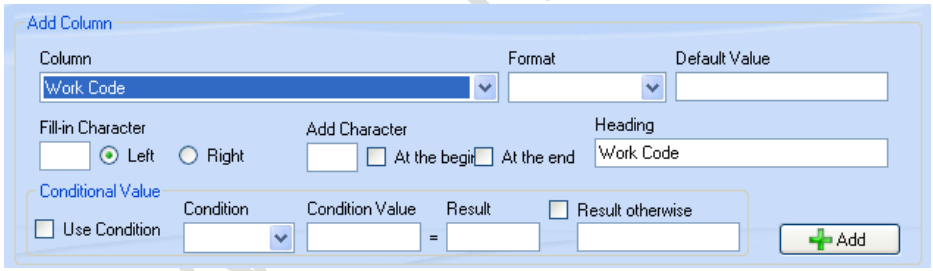
Export lets you send the displayed data to a file (CSV, TXT, LOG, DAT) with a personalized format.

11 EXPORT TO FILE

Access this window by clicking on **Export** on the lower right-hand corner of the **Reports** screen and then choose **Other Format.**



11.1 TYPES OF FIELD



Column: It corresponds to each of the table columns.

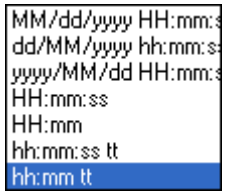
Format: Desired format for that field in the exported file. Some columns (the text columns) will only have one option, as it is explained ahead.

11.1.1 TEXT FORMATS

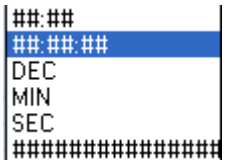
#: This indicates a character in the field's value. For instance, if the field corresponds to the value Monday and you only want the first three letters to appear, use ### as format, and you will get Mon. If the field had a smaller size, it will stay the same.

11.1.2 DATE FORMAT

We will use the following symbols: M = month, d = day, y = year, H = hour (24 hours), h = 12 hours (am/pm), m = minutes, s = seconds, tt = am/pm.



11.1.3 NUMBER FORMAT



##:## indicates the number will be shown as Total Hours: Total Minutes
##:##:## indicates the number will be shown as Total Hours: Total Minutes: Total Seconds.
DEC: Decimal format. For instance, two and a half hours would be 2.5.
MIN shows time in minutes.

SEC shows time in seconds.

11.1.4 OTHER PARAMETERS

Default Value: If the parameter is empty or if it has a fixed value, you can indicate it here.

Fill-in Character: If the text is shorter than its format requires, you can fill in that space with the character chosen here.

Add Character: You can decide whether to add the fill-in character before or after the field value.

Heading: Name that will appear on the heading of the file to export.

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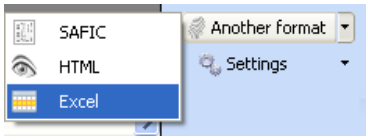
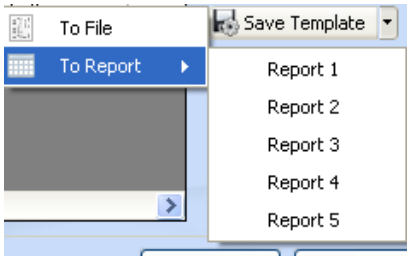
Conditional Value: You can define a conditional value. If the value in the field fulfills the condition, the value you defined can be displayed.

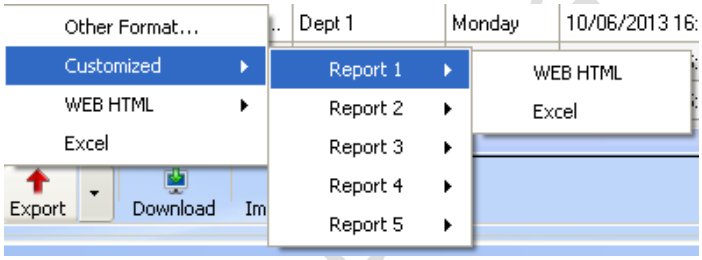


Here you can add or erase fields in the export template or move them to another position (**Up**, **Down**).

Once you define the export template, you can save it for future use. Templates can also be saved as a report.



You can define up to five Reports, which can be exported directly to HTML or Excel. The reports to use can be chosen in the **Records** window (five for Records and five for Summary by Day) and in **Reports** (five personalized reports). You can find these in **Export→Customized**.



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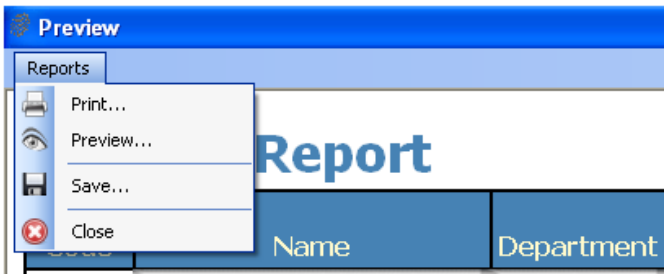
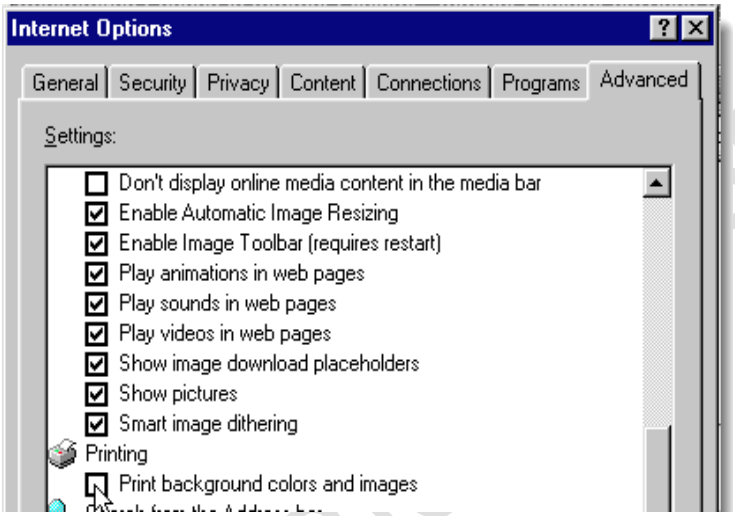
11.2 EXPORT TO HTML OR EXCEL

By choosing **Other Format**, you can directly export the report as an HTML or Excel file.



If the colors or logos in the table do not show when you print the web HTML file, you must change your browser configuration (Internet Explorer in this example) to allow for these components at **Tools→Internet Options**.



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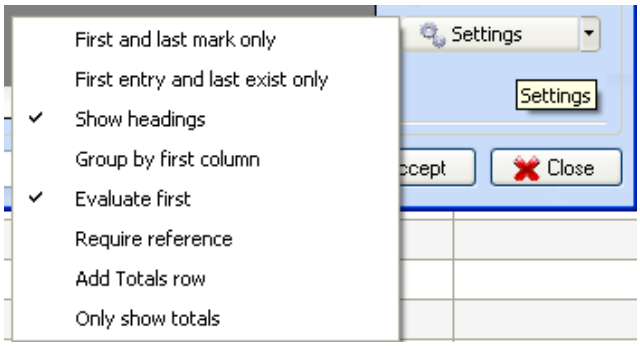
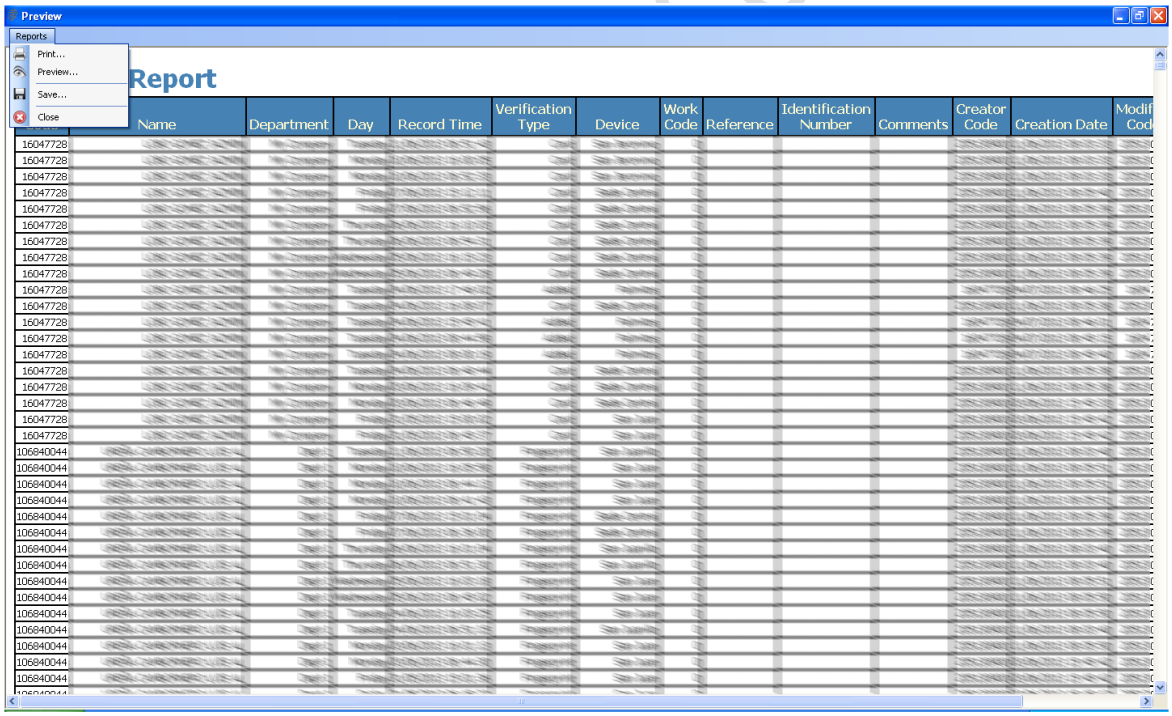
11.3 HTML FILE REPORT CONFIGUTARION OPTIONS



You can decide whether to include headings, require references, or show only total values in the generated file.

11.4 EXPORT GENERATED REPORT TO HTML FILE

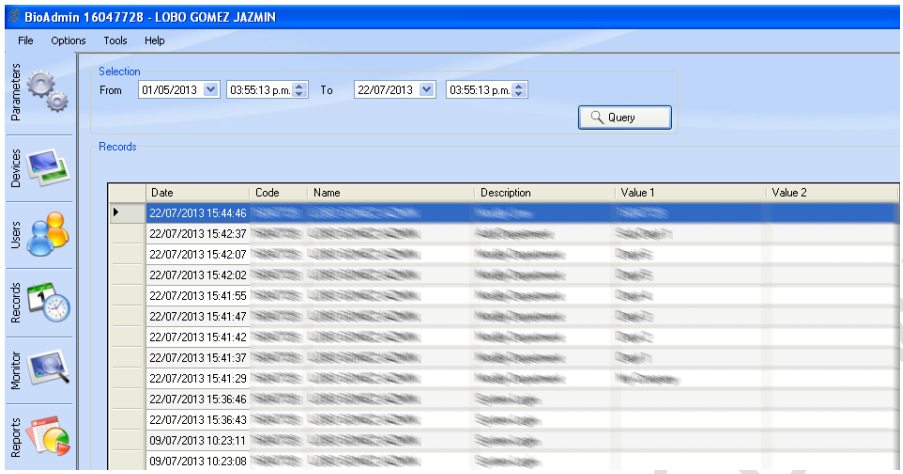
The report can be directly exported as an HTML file. If you do not want to display all fields, you can hide them in the **Parameters** window, where you can also change the report style.



12 HISTORY

In this section you will be able to access a full log of all user activity of the program in the dates and times of your choice.

You can find it by clicking on **Options→History** on the main menu.



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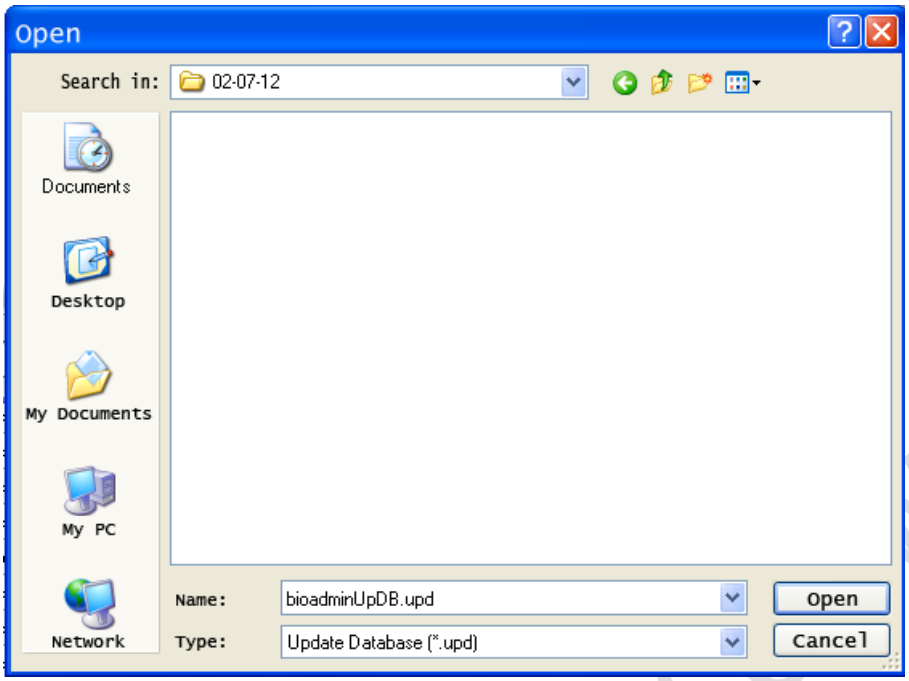
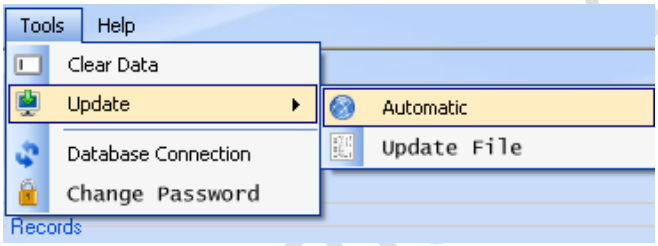
13 DATABASE UPDATE



In order to update the database, go to **Update→Update File** on the **Tools** menu.



Pick the .upd file you want to use to update your database.

When you finish doing this, a message will tell you the status of the update.

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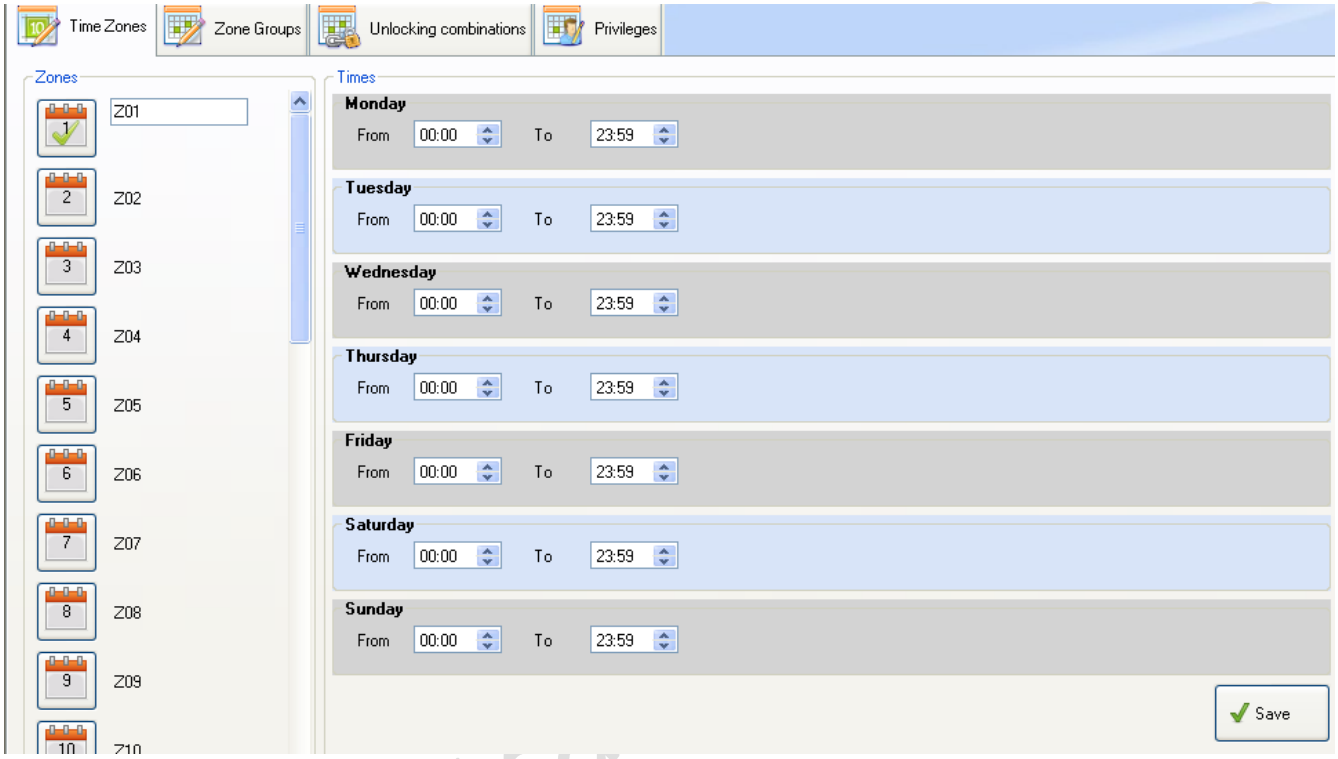
14 ACCESS CONTROL

You will find this window by clicking on the **Access Control** button on the left-hand panel or from the main menu through **Options→Access Control**.



Here you will be able to set up the control network defined by the access control devices you installed. You will easily organize the different schedules and define who gets access when. The system includes different time zones, zone groups, unlocking combinations, and privileges that can be assigned to users.

We now describe how to set up time zones, which will be organized in zone groups users can be assigned to, and finish with how to create unlocking combinations.

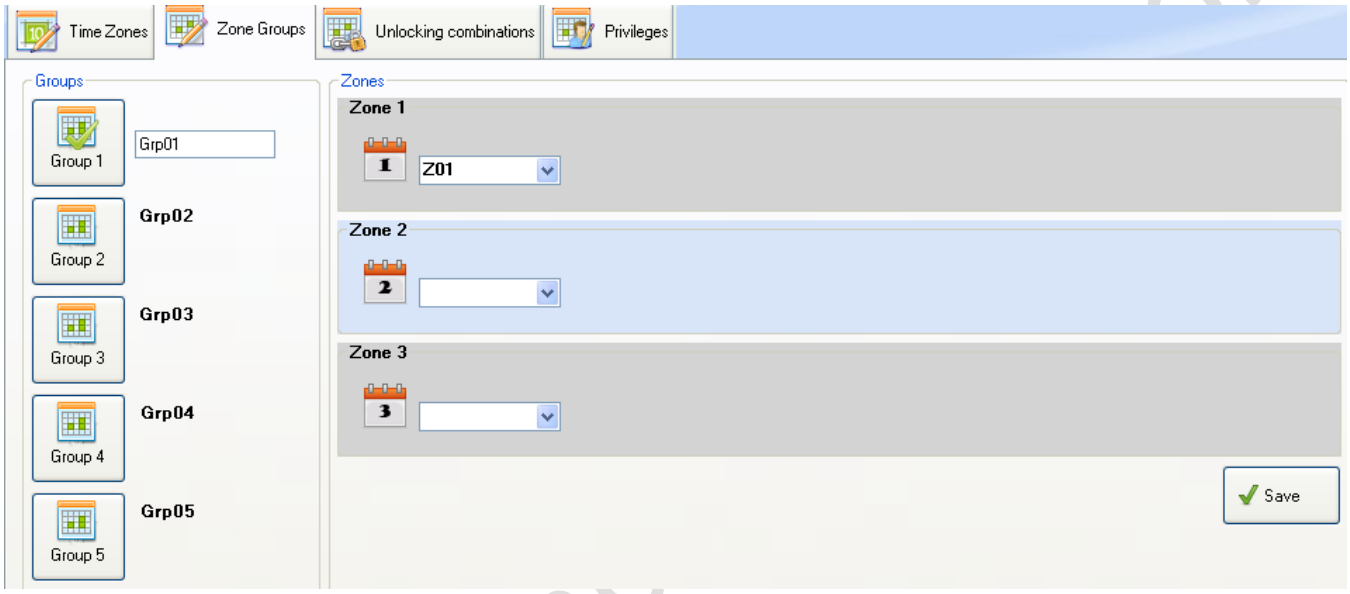
14.1 TIME ZONES

You can create up to fifty different time zones. Each one defines a different schedule during which users may be granted access or not.

For instance, if you make zone 1 (Z01) be Monday through Friday from 08:00 to 18:00, plus Saturdays and Sundays from 00:01 to 00:00, users in zone 1 will only be granted access if they make their attendance mark between 8am and 6pm Monday through Friday. By defining an entry time that begins after the exit time Saturdays and Sundays, by default no one will be able to go in during those days**.**

To make changes on any of the fifty time zones, simply set up the desired times for each day and then click on **Save.**

14.2 ZONE GROUPS



You can create up to five zones groups, with up to three different time zones each. If a user is assigned to Group 1, which includes times zones 2, 7, and 18, he will have the combined access of the three zones.

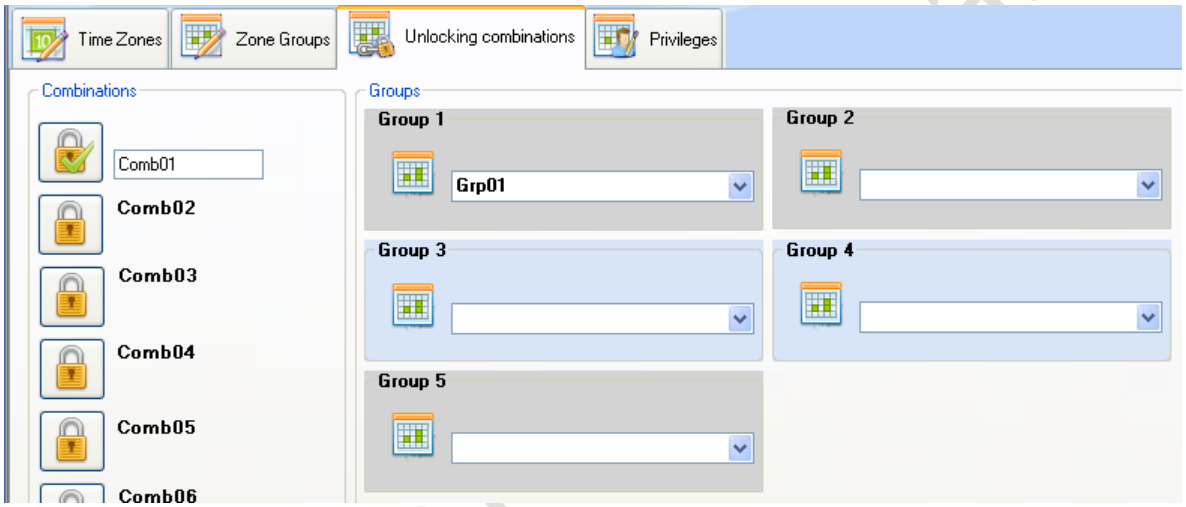
The idea when setting up groups is assigning more and more restrictive schedules, depending on the type of job of each employee sent to that group. For example, we could gather all managers in Group 1, other employees in Group 2, and the custodial and security staff in Group 3. By giving the first two daytime schedules and the last some that combine daytime and nighttime schedules, you can make sure that the managers and other employees do not have company access at night while the custodial and security staff has day-long access.

To make changes in a zone group, pick the different time zones you want to assign to it (which you set up in the previous step), and then click on **Save.**

14.3 UNLOCKING COMBINATIONS

You have the option to set up personnel access marks combinations in order to open a particular door. If you do not set them up, anyone with the right kind of access will be able to open any door determined by their zone group without any additional restrictions.

Continuing the example in the previous section, suppose that, for the sake of oversight, you wish that no employee be able to enter the building unless someone from the security department has already entered and vice versa. Then we can define combination 1 (Comb01) and assign it to the main door, requiring that at least one person from zone group 2 and one from zone group 3 (Grp02 and Grp03) make an access mark for the door to open. This way, if either two employees or two security officers tried to gain access by themselves, they would not be allowed in until someone from the other group is also there. Do not forget to **Save** the combinations by clicking the button on the right.



In order to associate a combination with a door, start by picking the groups required making their access marks together in order to gain access (hence the importance of the way you distribute employees into the different zone groups). Then click on **Send to Device** in the lower right-hand corner.

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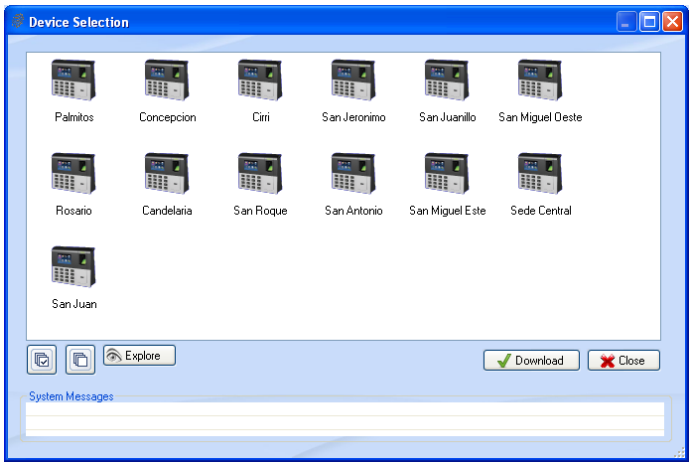


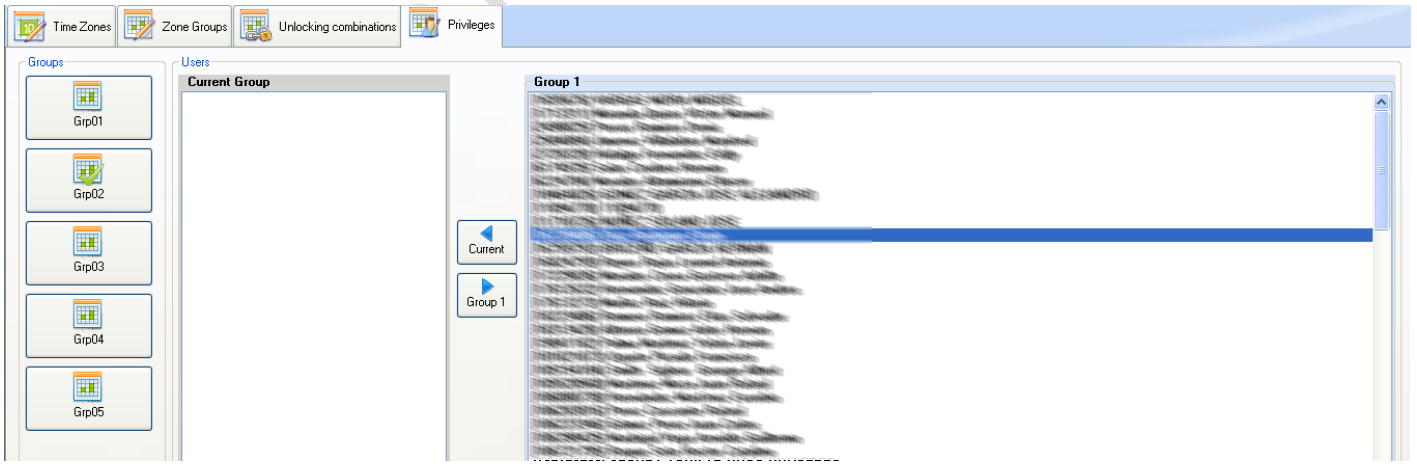
Choose the device to which you want to send the combination information and click on **Upload**. The chosen device will now need the established time zone combination in order to open.

14.4 PRIVILEGES

Here you can what users belong to which group, thus establishing their access privileges.

When you create users, they will be assigned to Group 1 by default.

Let's see an example of how to switch a user's group. Starting with two users (User 1 and User 2) assigned to Group 1, suppose we wish to switch User 2 to Group 3. If you click on **Grp01** on the left panel, you will see the two users on both columns, Current Group and Group 1, since these two coincide.



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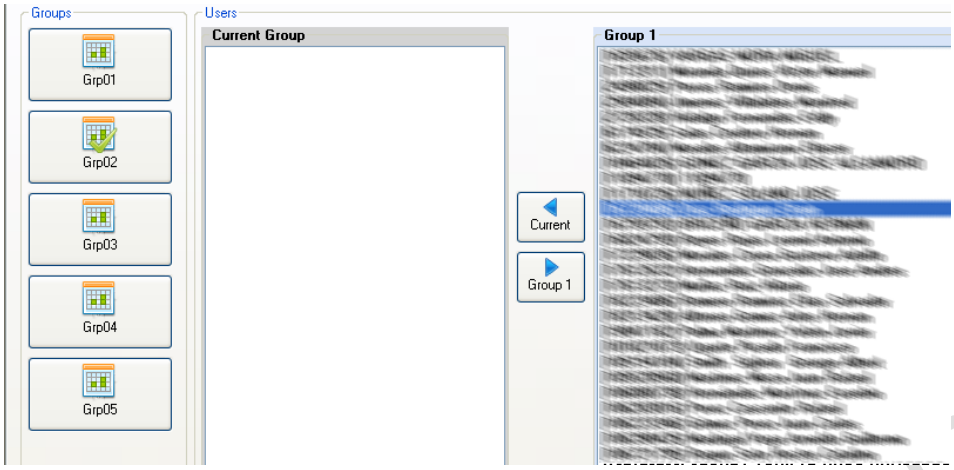
If you click on **Grp03**, this is what you will see:



Notice that both users are now only in the Group 1 column and that the Current Group (Group 3) is empty, as it has no members.

If you want to move User 2, select him, click on **Current** and then on **Save**. User 2 is now part of Group 3. You can repeat this process with any users to move them to any other group.

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